

FIG. 1

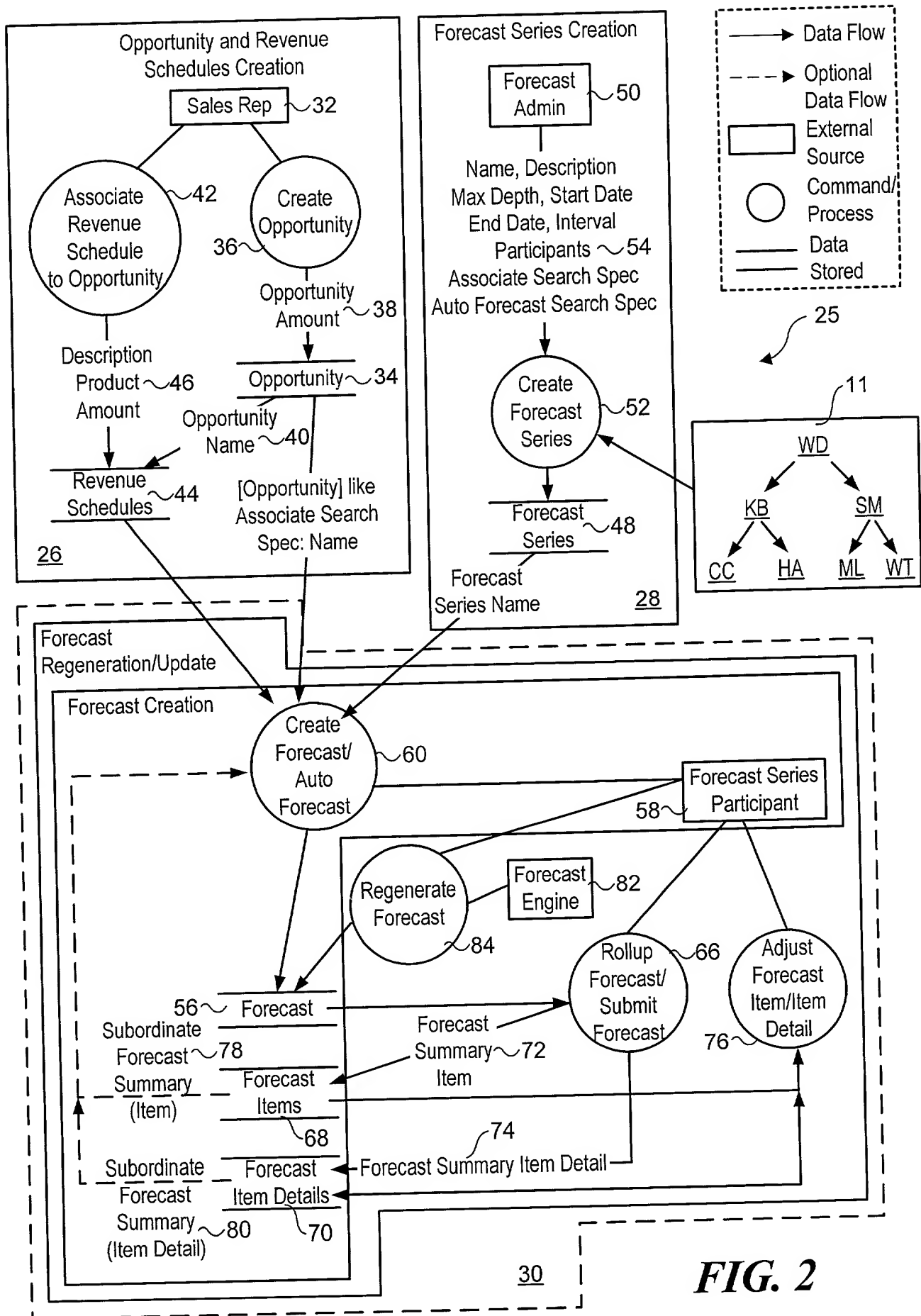


FIG. 2

Creating Forecast Series

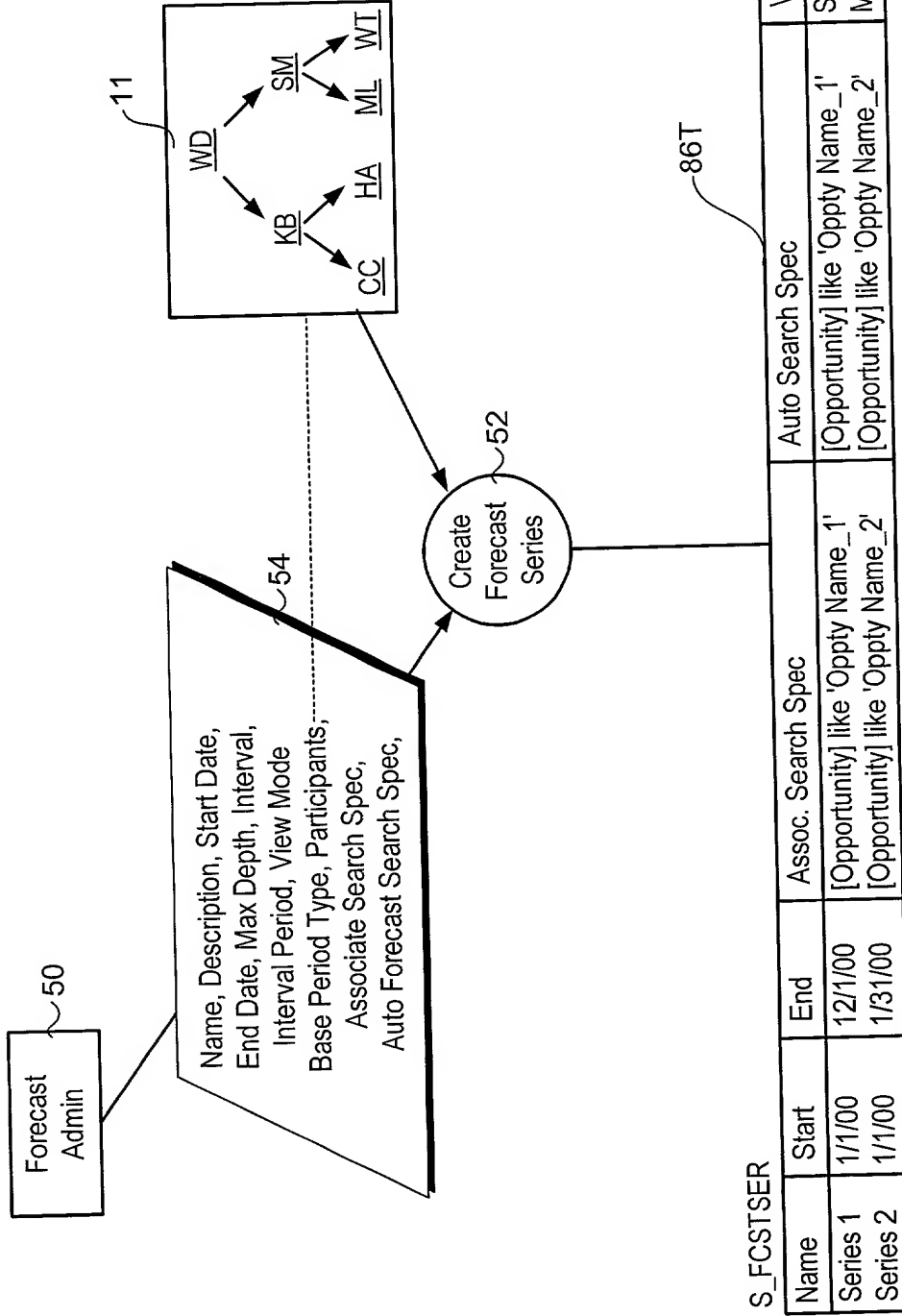


FIG. 3

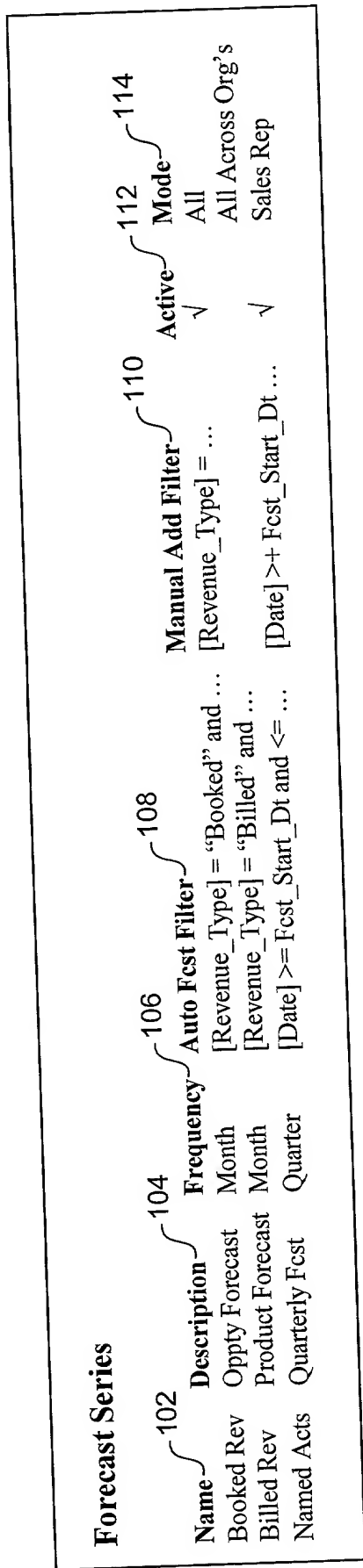


FIG. 4

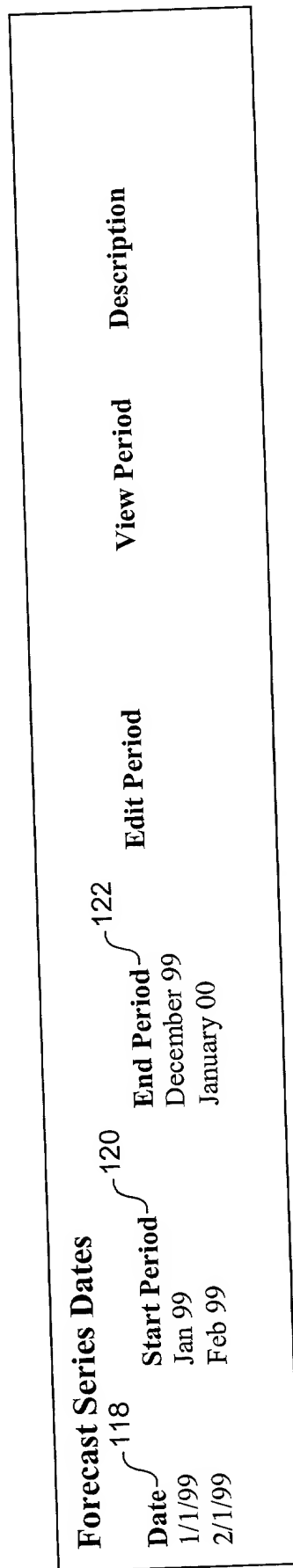


FIG. 5

Forecast Participants

126	128	130	132	134	136	138	140
Last Name	First Name	Position	Position Type	Region	Division	Department	Rolls Up To
Conway	Chris	Call Center Rep, NY	Outbound Rep	Western	Telesales	Telesales	Walter Davis
Alacon	Hector	Field Sales Rep, NJ	Field Sales Rep	Eastern	Field Sales	Telesales	Kim Beale

FIG. 6A

124

Add Forecast Participants

142	144	146
Last Name	First Name	Position
Conway	Chris	Call Center Rep, NY
Alacon	Hector	Field Sales Rep, NJ
Position Type	Region	Division
Outbound Rep	Western	Telesales
Field Sales Rep	Eastern	Field Sales
Parent Pos	Department	Manager
Mgr, Tele	Telesales	Walter Davis
Mgr, Field	Telesales	Kim Beale

Add

New

Close

FIG. 6B

142

S_FCSTSER

86T

Series	Start Date	End Date	Base Period	Interval	Interval Period Type
Series 1	1/1/2000	12/1/2000	Month	7	Day

S_FCSTSER_DATE (from Forecast Series Date View

148T

Forecast Date	Start Date	End Date	History View Date	History Edit Date
1/1/2000	1/1/2000	1/31/2000	11/1/99	12/1/99
1/8/2000	1/1/2000	1/31/2000	11/1/99	12/1/99
1/15/2000	1/1/2000	1/31/2000	11/1/99	12/1/99
1/22/2000	1/1/2000	1/31/2000	11/1/99	12/1/99
1/29/2000	1/1/2000	1/31/2000	11/1/99	12/1/99
2/5/2000	2/1/2000	1/29/2000	11/1/99	12/1/99

S_FCSTSER_POSTN (from Forecast Series Participants View)

150IT

Last Name	First Name	Position	Parent Position
Stevens	William	Sales Rep	Manager-West
Conway	Chris	Manager-West	Manager-US
Alacon	Hector	Manager-US	Vice President

FIG. 7

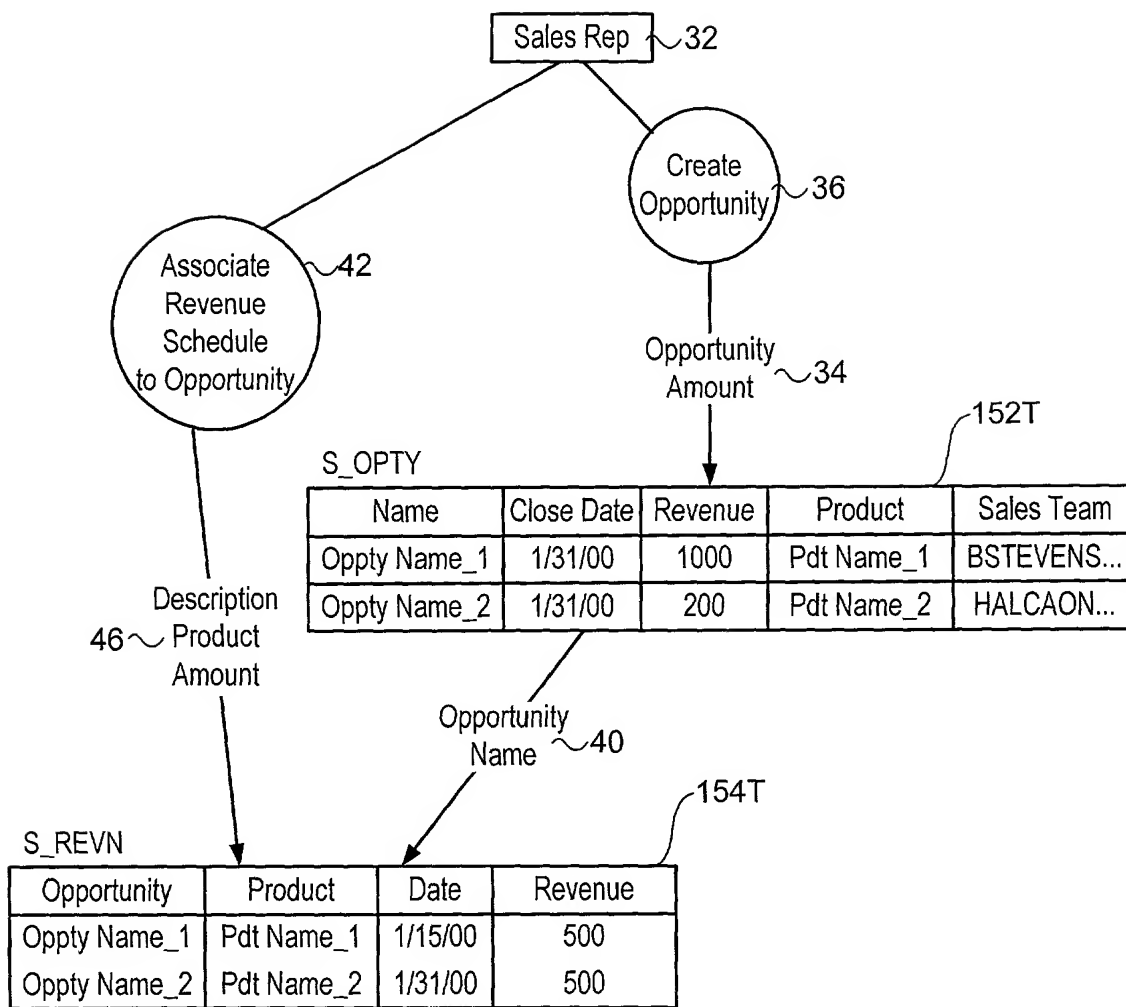


FIG. 8

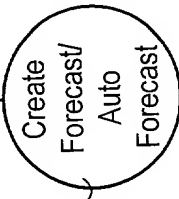
S_FCSTSER_POSTN

Last Name	First Name	Position	Parent Position
Stevens	William	Sales Rep	Manager-West

150T

Forecast Series Participant

58



60

86T

S_FCSTSER

Name	Start	End	Assoc. Search Spec	Auto Search Spec	View Mode
Series 1	1/1/00	12/1/00	[Opportunity] like 'Oppty Name_1'	[Opportunity] like 'Oppty Name_1'	Sales Rep
Series 2	1/1/00	1/31/00	[Opportunity] like 'Oppty Name_2'	[Opportunity] like 'Oppty Name_2'	Manager

S_FCST

Series	Date
Series 1	Oppty Name-1

156T

S_REVN

Opportunity	Product	Date	Revenue
Oppty Name_1	Pdt Name_1	1/15/00	500
Oppty Name_2	Pdt Name_2	1/31/00	500

154T

S_FCST_ITEM

Date	Product	Opportunity
1/15/00	Pdt Name_1	Oppty Name_1
1/31/00	Pdt Name_2	Oppty Name_2

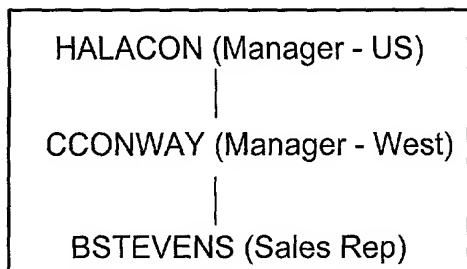
160T

S_FCST_ITEM_DTL

Date	Revenue
1/15/00	500
1/31/00	500

162T

FIG. 9



ORGANIZATION
HIERARCHY

FIG. 10

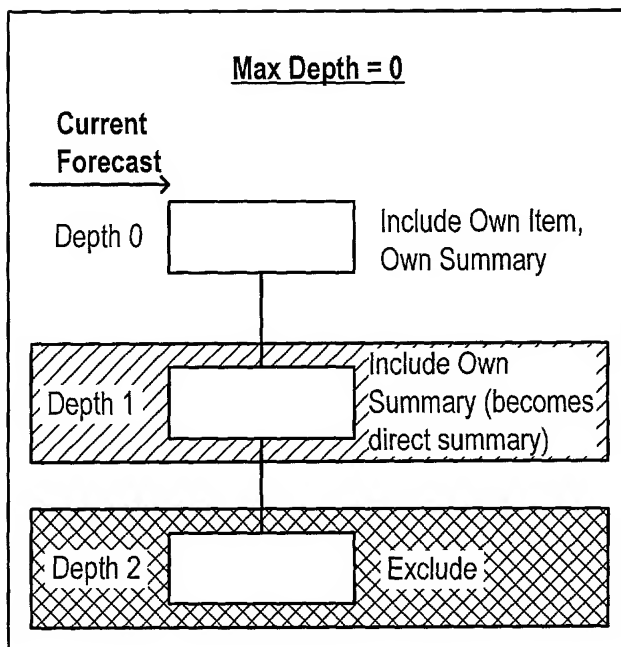


FIG. 11A

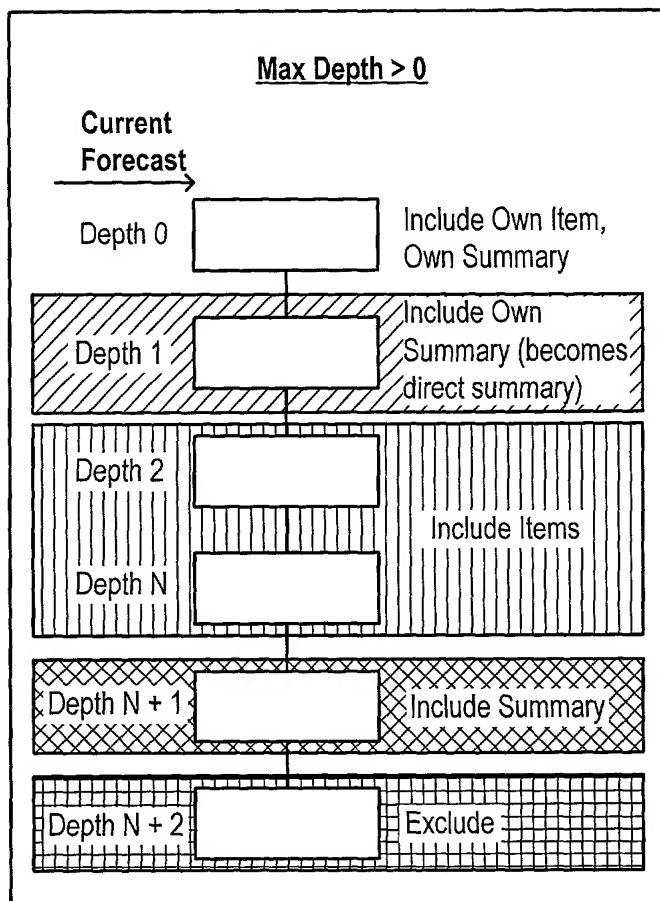


FIG. 11B

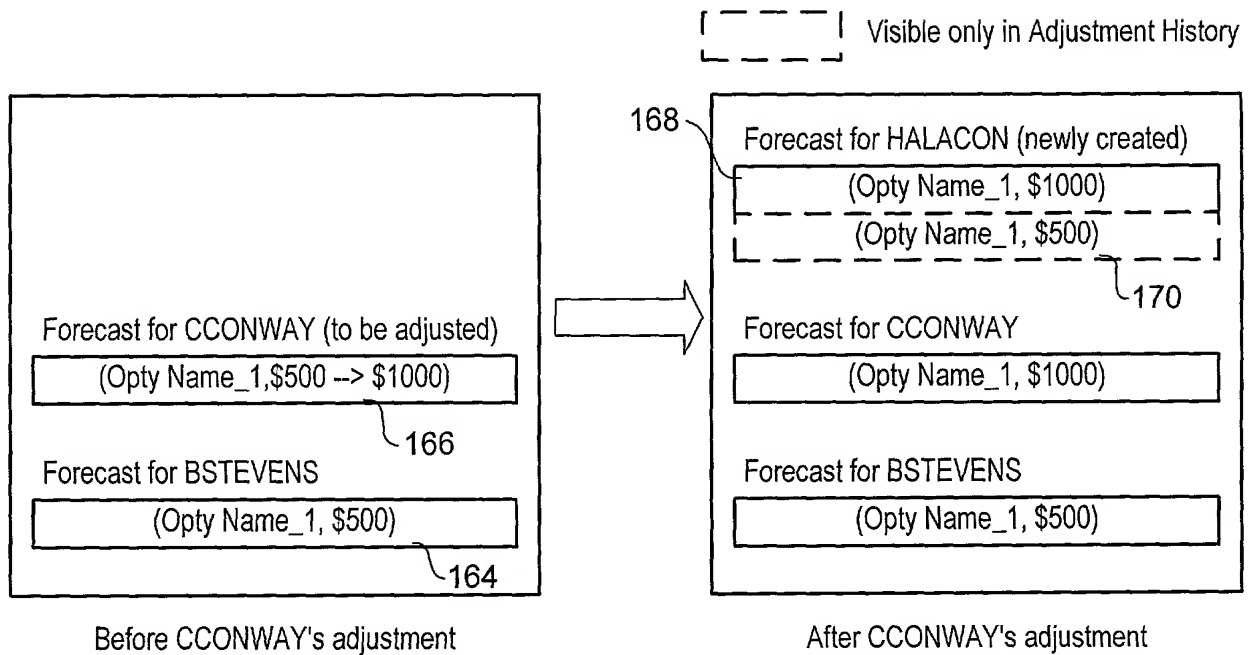


FIG. 12

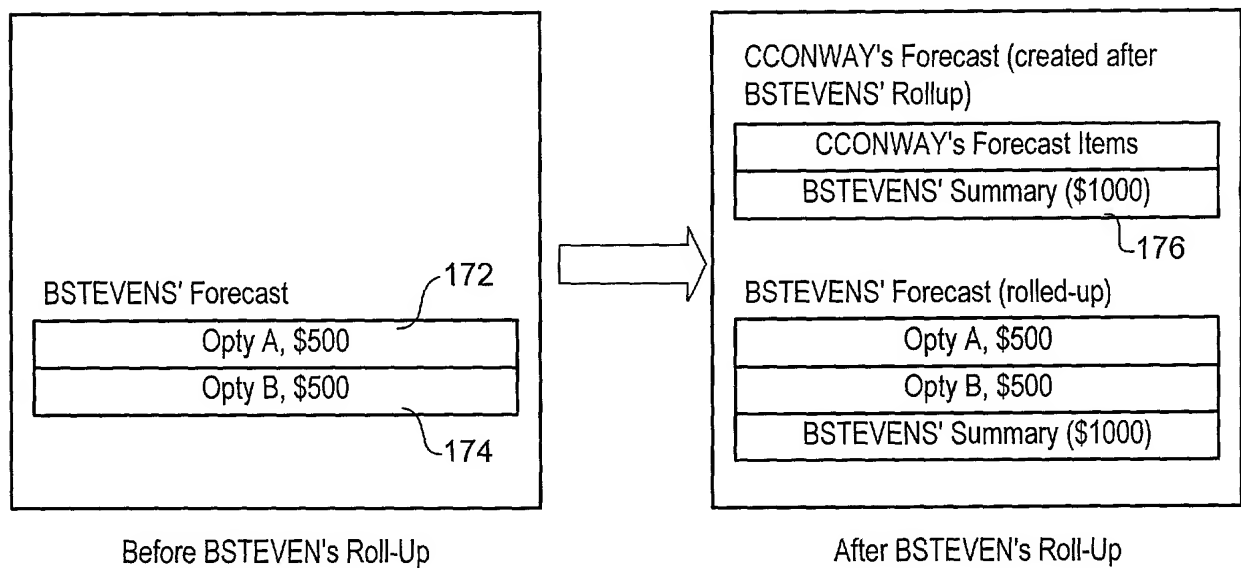


FIG. 13

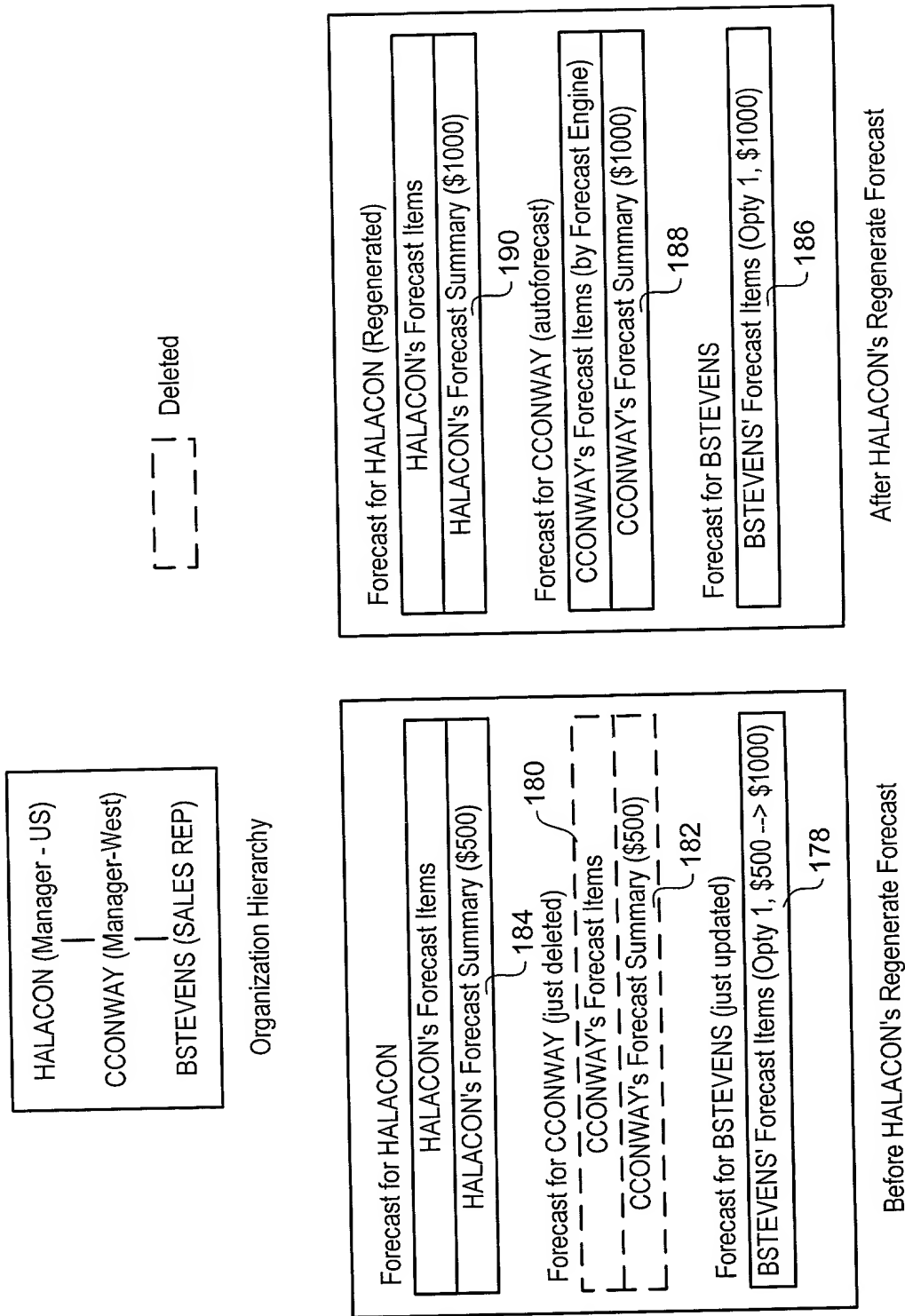


FIG. 14

```

graph TD
    Start((Start)) --> 194((Initial))
    194 -- "Created Revenue Schedules  
Created Forecast Series  
Create Forecast" --> 198((Created Forecast))
    198 -- "Change own items  
Adjust subordinate items  
Regenerate Forecast" --> 198
    198 -- "Included in Mgr Forecast" --> 200a((Included in Forecast))
    198 -- "Submit Forecast" --> 200b((Submitted Forecast))
    198 -- "Unsubmit Forecast" --> 200b
    200a -- "Change Own Items  
Adjust subordinate items  
Regenerate Forecast" --> 200a
    200a -- "Submit/Forecast" --> 204((Included as submitted in Forecast))
    200b -- "Unsubmit Forecast" --> 200b
    200b -- "Included in Mgr Forecast" --> 204
    204 -- "Unsubmit Forecast" --> 200b
  
```

FIG. 15

192

212

Account		A.K. Parker Inc., HQ		216		Opportunity		275 Portables at A.K. Parker		232		234	
Address		101 Main Street		220		Description		Great opportunity for our ...		222		Revenue	
		San Mateo, CA 94402				Lead Quality		High		224		Upside	
		USA		...		Methodology		Strategic Selling		228		Close Date	
Source		ABC TV Ad		218		Sales Stage		03 - Qualification		230		Probability	
												50%	

Opportunity Revenues		242		244		250		Update		Script	
Summary	Date	Descr	Product	Qty	Price	Revenue	Upside	Downside	Rev Class	Rev Type	Prob Sales Rep
✓	1/1/99		1 GB Drive	10	\$250	\$2500			Closed		50% HALACON
	2/1/99		1 GB Drive	50	\$200	\$10000			Commit		50% CCONWA
	3/1/99		-	-	-	\$50,000	\$40,000		Expected	Bookings	60% HALACON
	4/1/99	Install	-	-	-	\$1800					70% HALACON
✓	5/1/99	Services	-	-	-	\$50,000	\$25,000	\$30,000	Upside	Billings	60% CCONWA
	6/1/99		T1 Rental	5	\$10	\$3000					60% CCONWA
	6/1/99		T1 Rental	5	\$15	\$4500					70% HALACON
Totals				100		\$140,000	\$65,000	\$30,000			

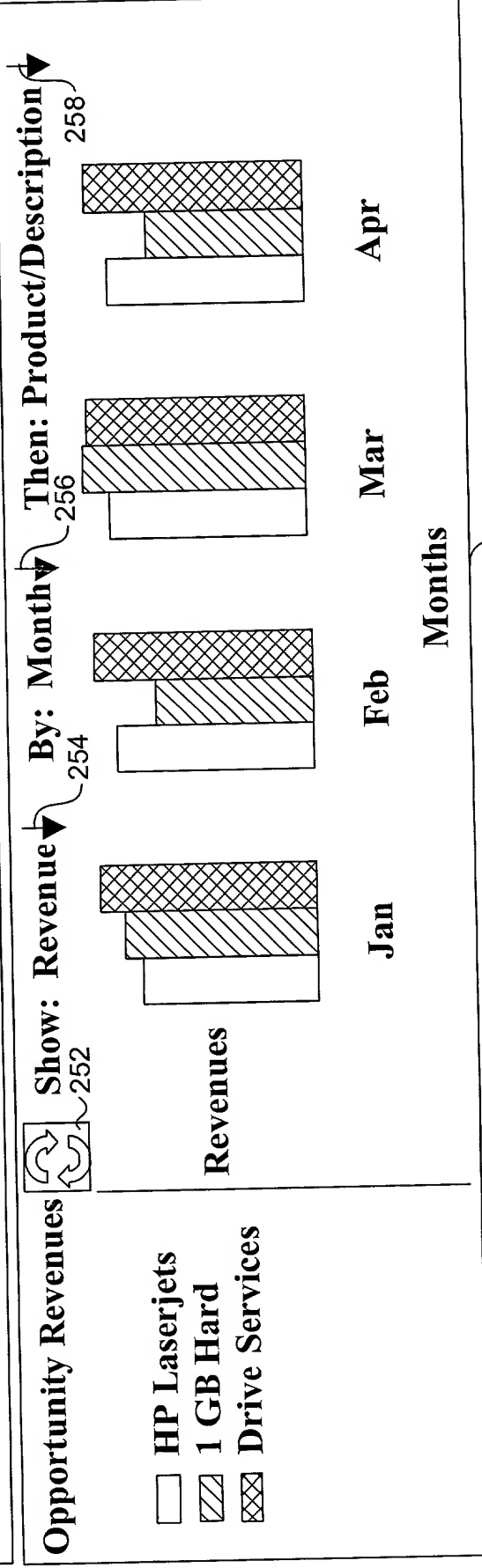
210

214

FIG. 16

212

Account	A.K. Parker Inc., HQ	Opportunity	275 Portables at A.K. Parker	Committed	<input type="checkbox"/>
Address	101 Main Street San Mateo, CA 94402 USA	Description	Great opportunity for our ...	Revenue	\$850,000
Source	ABC TV Ad	Lead Quality	High	Upside	\$125,000
		Methodology	Strategic Selling	Close Date	04/01/99
		Sales Stage	03 - Qualification	Probability	50%



214A

FIG. 17

210

Revenue Schedule Wizard – Step 1 of 4 – Date Range

Start Date: 1/1/99 ▼ 264
End Date: 12/31/99 ▼ 266
Frequency: Month ▼ 268
No. of Periods: 12 ▼ 270

☒ Replace the existing revenue schedule items

272

Cancel

< Back

Next >

Finish

262

274

FIG. 18A

Revenue Schedule Wizard – Step 2 of 4 – Default Values

Account: A.K. Parker Inc. ▼ 278
Opportunity: 275 Portables ▼ 280
Contact: ▼ 282
Product: 1 GB Hard Drives ▼ 284
Product Line: Hardware ▼ 286
Revenue Class: Upside ▼ 288
Revenue Type: Telecommunications ▼ 290

Cancel

< Back

Next >

Finish

276


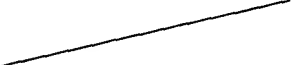
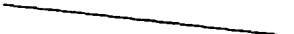


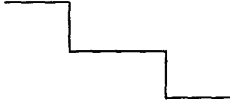
292

FIG. 18B

FIG. 18C

Revenue Schedule Wizard – Step 3 of 4 - Patterns

Patterns: 296~○ Quantity 298~● Price 300~○ Revenue

<div>Straight Line</div> <div></div> <div>302</div>	<div>Increasing 10%</div> <div></div> <div>304</div>	<div>Decreasing 5%</div> <div>314 (TYP)</div> <div></div> <div>306</div>
<div>Marginal Returns -10%</div> <div></div> <div>308</div>	<div>Exponential 10%</div> <div></div> <div>310</div>	<div>Stepped -10%</div> <div></div> <div>312</div>

Select the appropriate revenue schedule patterns for Quantity, Price, and Revenue

Cancel

<Back

Next >

Finish

294

FIG. 18C

316

Revenue Schedule Wizard – Step 4 of 4 – Amounts

Starting Quantity:

Starting Price:

Starting Revenue:

320

Average Price:

Total Quantity:

Total Revenue:

\$250

3000

\$600,000

322

Cancel

<Back

Next >

Finish

318

FIG. 18D

324

328

Revenues

Flag Summary Date	Commit	Account	Opportunity	Description	Revenue	Rev Class	Prob	Sales Rep
✓ 1/1/99		AK Park	275 Portables	Services	\$50,000	Bookings	50%	HALACON
✓ 1/1/99	✓	AK Park	275 Portables	Hardware	\$65,000	Bookings	60%	HALACON
✓ 1/1/99		AK Park	275 Portables	Networks	\$25,000	Billings	50%	HALACON
✓ 1/1/99		AK Park	275 Portables	Services	\$35,000	Bookings	60%	HALACON
✓ 1/15/99	✓	Acme	Routers + Hub	Networks	\$65,000	Bookings	50%	HALACON
✓ 1/15/99	✓	Acme	Routers + Hub	Install	\$90,000	Bookings	50%	HALACON
✓ 1/15/99		Acme	Routers + Hub	Rollout	\$65,000		50%	HALACON

Revenue Analysis



Show:

Revenues

By:

Month

Then: Account

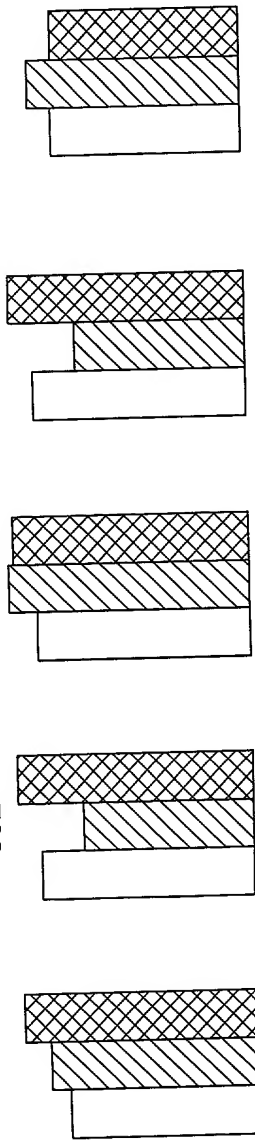
332

334

336

- Acme
- AK Parker
- AG Edwards

Revenues



Jan

Feb

Mar

Apr

May

Months

326

330

FIG. 19

410

Forecasts

Series	Fest Date	Status	Forecaster	Created By	Create Date	Submitted By	Submit Date	Revenue Amt
Billings	02/01/99	In Process	KBEALE	KBEALE	02/01/99			\$1,000,000
Billings	01/01/99	In Process	KBEALE	SADMIN	01/01/99	SADMIN	1/1/99	\$1,300,000
Bookings	01/01/99	In Process	KBEALE	SADMIN	01/01/99	SADMIN	1/1/99	\$1,200,000
Billings	12/01/98	Submitted	CCONWAY	CCONWAY	12/01/98	CCONWAY	12/01/98	\$1,700,000
Bookings	12/01/98	Submitted	CCONWAY	CCONWAY	12/01/98	CCONWAY	12/01/98	\$1,500,000

Series	Billings	214 ▼	Forecaster	KBEALE	418 Create Date	02/01/99	430 ▼
Forecast Date	02/01/99	216 ▼	Division	Sales	424 Created By	SADMIN	432
Status	Active	220 ▼	Position	NE Sales Rep3	426 Submit Date	02/01/99	434 ▼
Revenue Amt	\$1,200,000	422	Position Type	Field Sales	Submitted By	SADMIN	436


408

212

FIG. 20

438

Series	Billings	214	▼	Forecaster	KBEALE	Create Date	02/01/99	430	▼
Forecast Date	02/01/99	216	▼	Division	Sales	Created By	SADMIN	432	▼
Status	Active	220	▼	Position	NE Sales Rep3	Submit Date	02/01/99	434	▼
Revenue Amt	\$1,200,000	422	▼	Position Type	Field Sales	Submitted By	SADMIN	436	▼

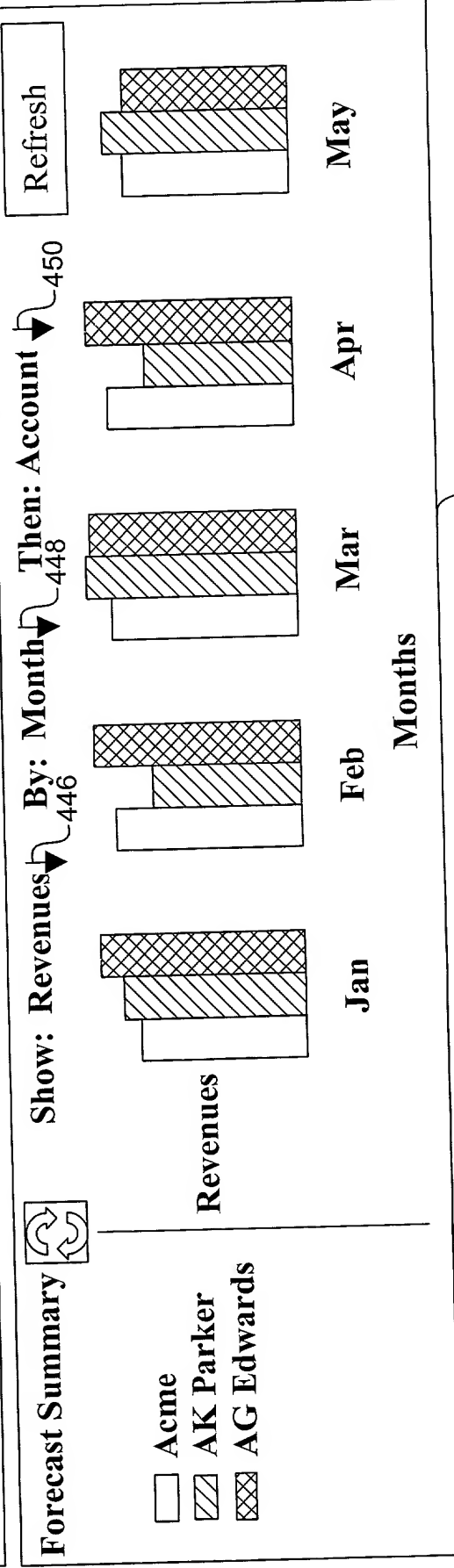
Forecast Line Items									
<div>  <div> Show: <div>442</div> <div>GO</div> </div> </div>									
Date	Fcst	Cmt	Account	Opportunity	Description	Revenue	Upside	Downside	Margin
1/1/99	✓		AK Parker	275 Portables	Services	\$50,000	\$30,000		50%
1/1/99		✓	AK Parker	275 Portables	Hardware	\$65,000		\$40,000	60%
1/1/99	✓		AK Parker	275 Portables	Networks	\$25,000			50%
1/1/99			AK Parker	275 Portables	Services	\$35,000			50%
1/15/99	✓	✓	Acme	Routers + Hub	Networks	\$65,000	\$45,000		60%
3/15/99	✓	✓	Acme	Routers + Hub	Install	\$90,000		\$15,000	75%
1/15/99	✓		Acme	Routers + Hub	Rollout	\$65,000		\$15,000	75%

440

FIG. 21

438

Series	Billings	214	▼	Forecast	KBEALE	Create Date	02/01/99	430	▼
Forecast Date	02/01/99	216	▼	Division	Sales	Created By	SADMIN	432	
Status	Active	220	▼	Position	NE Sales Rep3	Submit Date	02/01/99	434	▼
Revenue Amt	\$1,200,000			Position Type	Field Sales	Submitted By	SADMIN	436	



444

FIG. 22

437

452

Forecasts

Series	Fcst Date	Status	Forecaster	Created By	Create Date	Submitted By	Submit Date
Billings	02/01/99	In Process	KBEALE	KBEALE	02/01/99	KBEALE	1/1/99
Billings	01/01/99	In Process	KBEALE	KBEALE	01/01/99	SADMIN	1/1/98
Billings	12/01/98	In Process	KBEALE	SADMIN	12/01/98		



Forecast Comparison

Show: Revenues

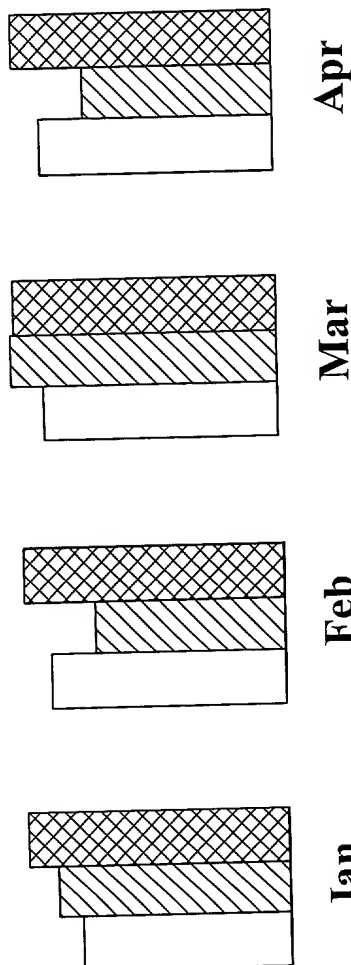
By: Month

458

456

Revenues

- 02/01/99 Billings
- 01/01/99 Billings
- 12/01/98 Billings



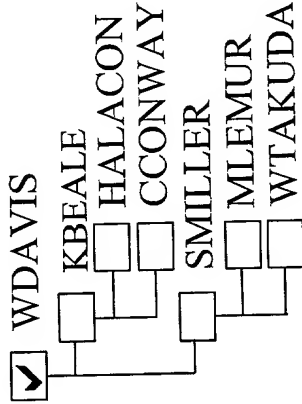
454

FIG. 23

462

464

Employees



Employees

Name	UserID	Position
Walter Davis	WDAVIS	VP of Sales
Kim Beale	KBEALE	Regional Manager, NE
Hector Alacon	HALACON	Field Sales Rep, NJ
Chris Conway	CCONWAY	Field Sales Rep, NY
Susan Miller	SMILLER	Regional Manager, SE
Mark Lemur	MLEMUR	Field Sales Rep, FL
Wayne Takuda	WTAKUDA	Field Sales Rep, GA

Forecast Summary

Show: Revenues 468

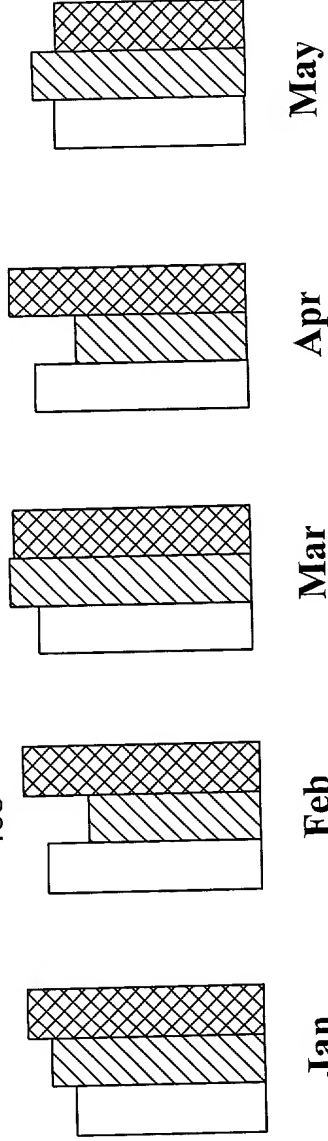
By: Month 470

Then: Account 472

Refresh

- ☐ Acme
- ☒ AK Parker
- ☒ AG Edwards

Revenues



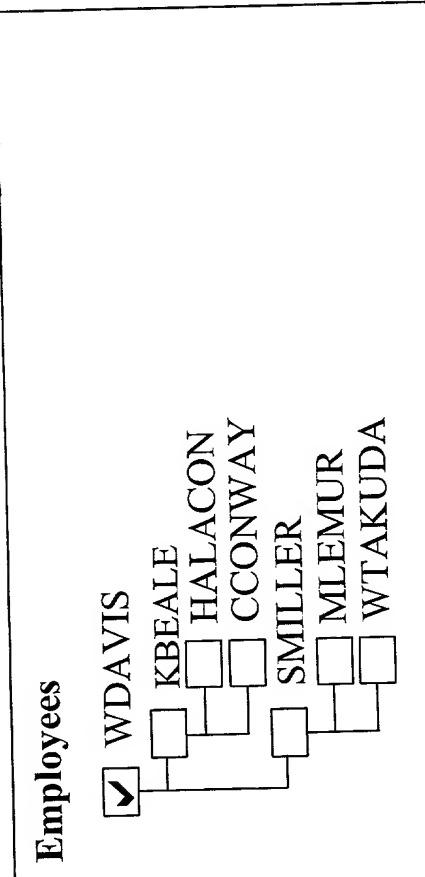
Months

460

466

FIG. 24

Employees		
Name	UserID	Position
Walter Davis	WDAVIS	VP of Sales
Kim Beale	KBEALE	Regional Manager, NE
Hector Alacon	HALACON	Field Sales Rep, NJ
Chris Conway	CCONWAY	Field Sales Rep, NY
Susan Miller	SMILLER	Regional Manager, SE
Mark Lemur	MLEMUR	Field Sales Rep, FL
Wayne Takuda	WTAKUDA	Field Sales Rep, GA



Forecast Line Items

Date	Fcst	Cmt	Account	Opportunity	Description	Revenue	Upside	Downside	Margin	Prob
1/1/99	✓		AK Parker	275 Portables	Services	\$50,000	\$30,000			50%
1/1/99		✓	AK Parker	275 Portables	Hardware	\$65,000		\$40,000	\$30,000	60%
1/1/99	✓		AK Parker	275 Portables	Networks	\$25,000				50%
1/1/99			AK Parker	275 Portables	Services	\$35,000				50%
1/15/99	✓	✓	Acme	Routers + Hub	Networks	\$65,000	\$45,000			60%
3/15/99	✓	✓	Acme	Routers + Hub	Install	\$90,000			\$45,000	75%
1/15/99	✓		Acme	Routers + Hub	Rollout	\$65,000		\$15,000	\$15,000	75%

FIG. 25

Revenues by Month, then by Account						
Account	Jan	Feb	Mar	Apr	May	Jun
Acme	35,000	40,000	45,000	35,000	25,000	30,000
AK Parker	10,000		25,000			
AG Edwards		25,000		30,000		
Totals	45,000	65,000	70,000	65,000	25,000	30,000

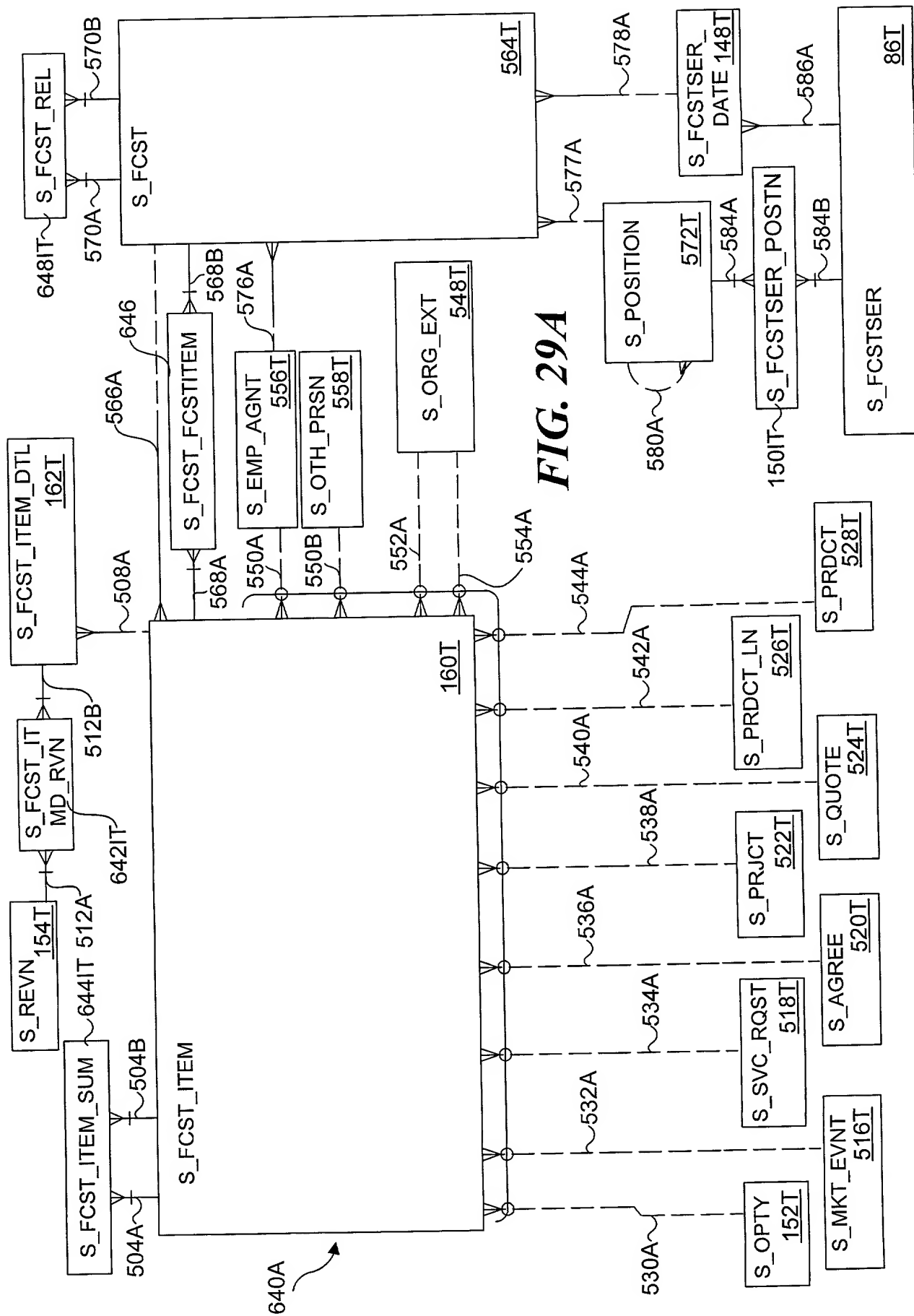
FIG. 26

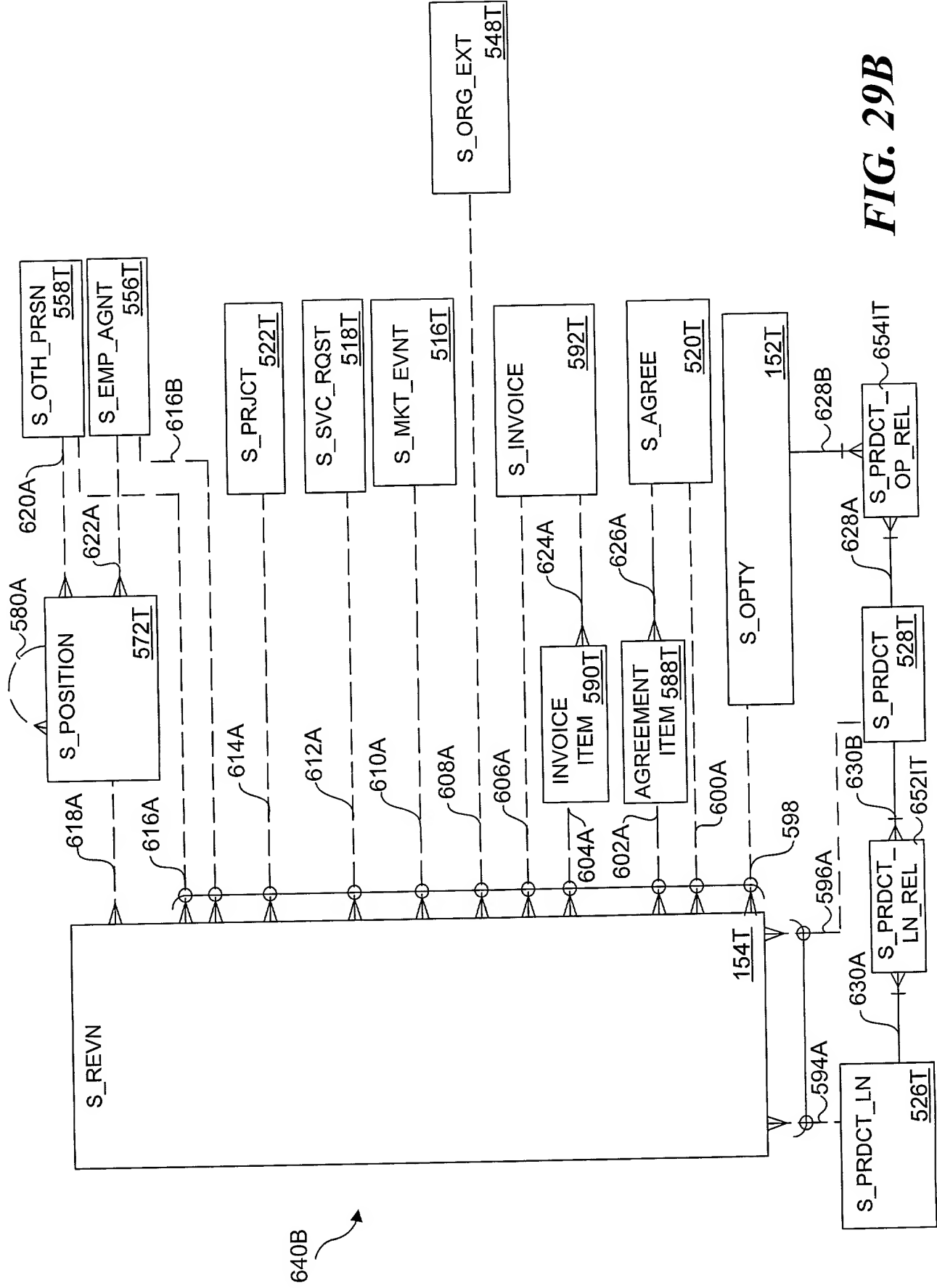
478

Revenues by Month, then by Account						
Account	Item	Commit	Prob	Sales Rep	Rev Cls	Rev Tp
Acme	Networks	✓	60%	HALACON	Bookings	Commit 65,000
	Install	✓	50%	HALACON	Bookings	Upside 50,000
	Rollout	✓	50%	HALACON		Expect 65,000
Acme Totals						65,000 115,000
AK Parker	Services	✓	50%	HALACON	Bookings	Commit 50,000
	Hardware		60%	HALACON	Bookings	Commit 65,000
	Networks	✓	60%	HALACON		Upside 25,000
	Services	✓	50%	HALACON	Billings	35,000
AK Parker Totals						75,000 100,000
...						
Grand Totals						230,000 350,000

FIG. 27

480





What Table is this in the Schema?

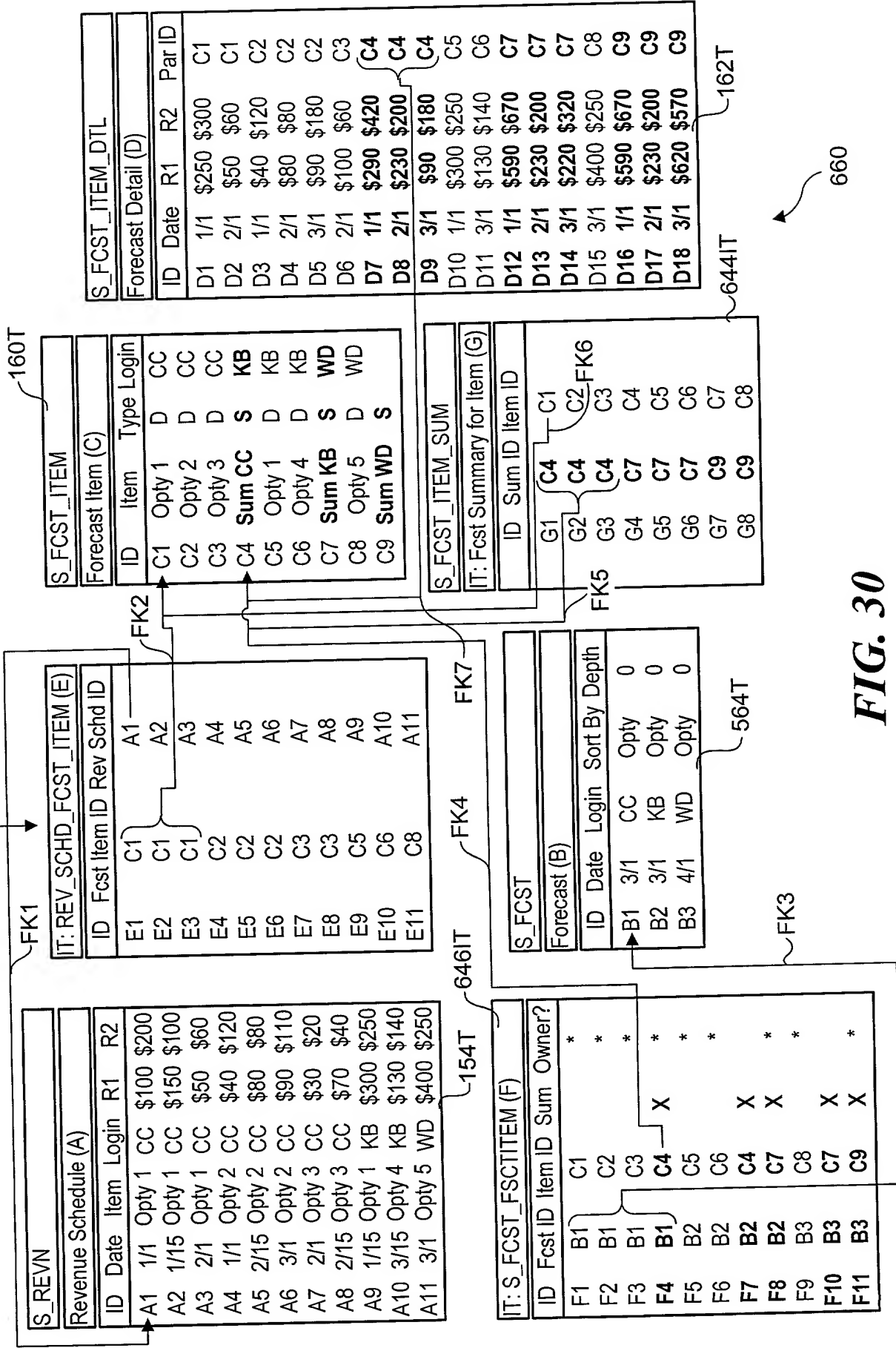


FIG. 30

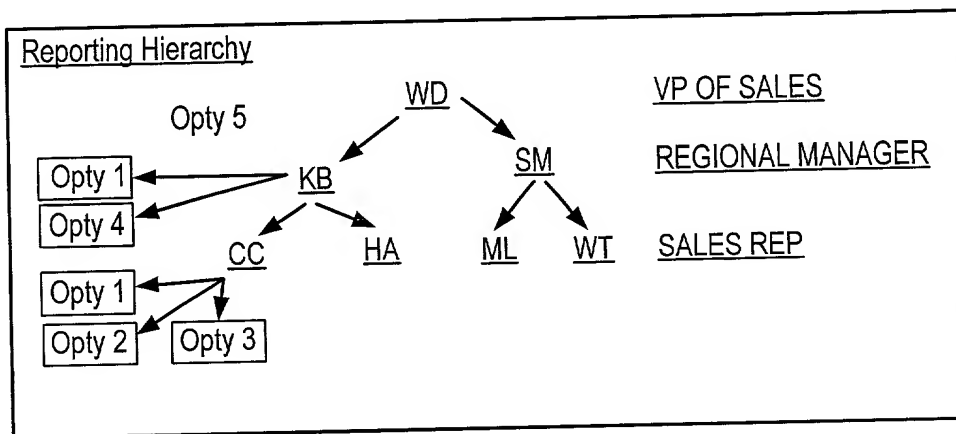


FIG. 31

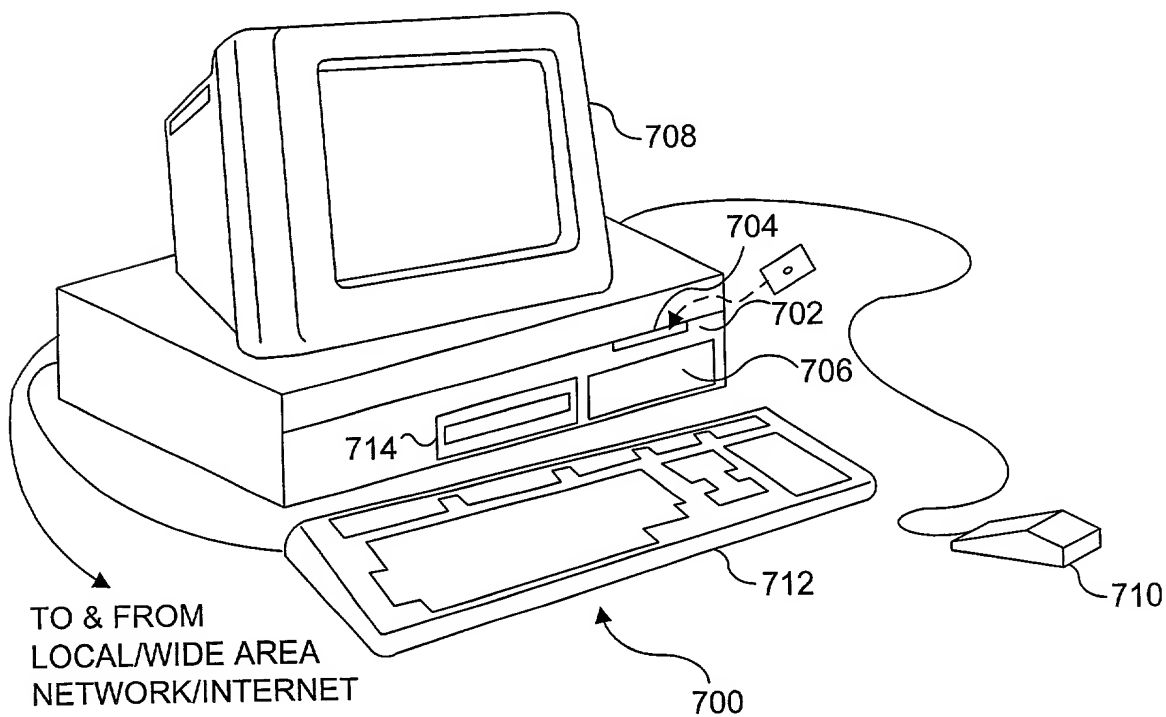


FIG. 35

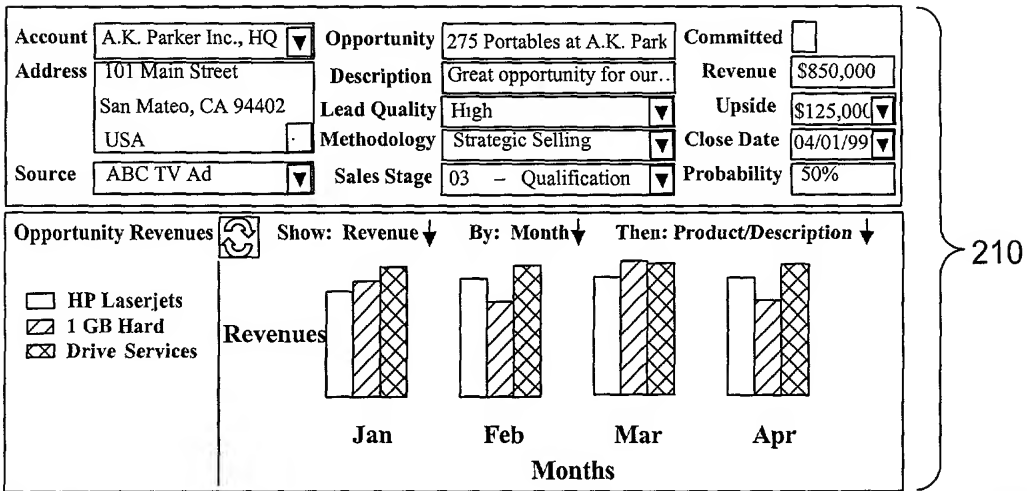
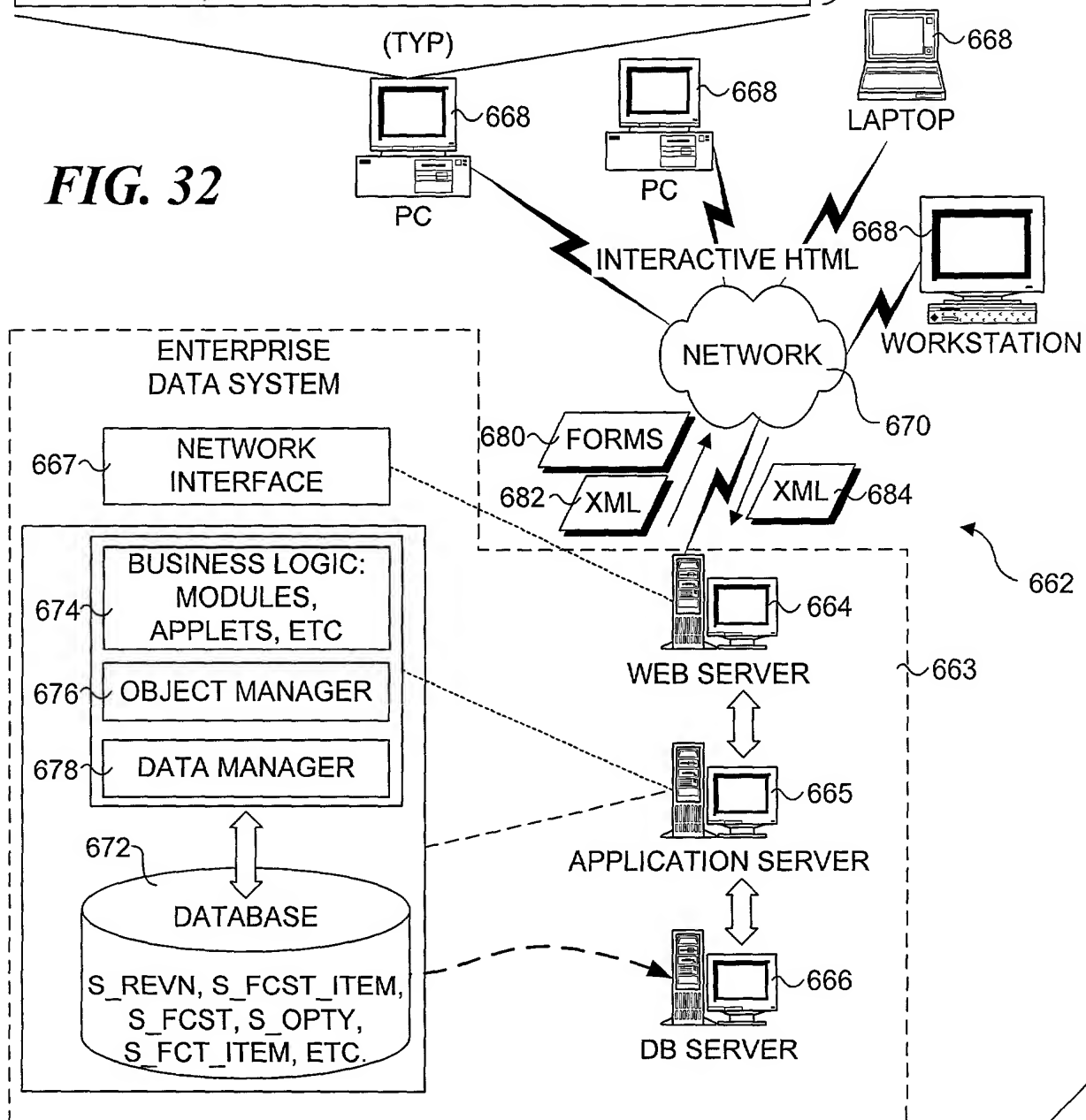


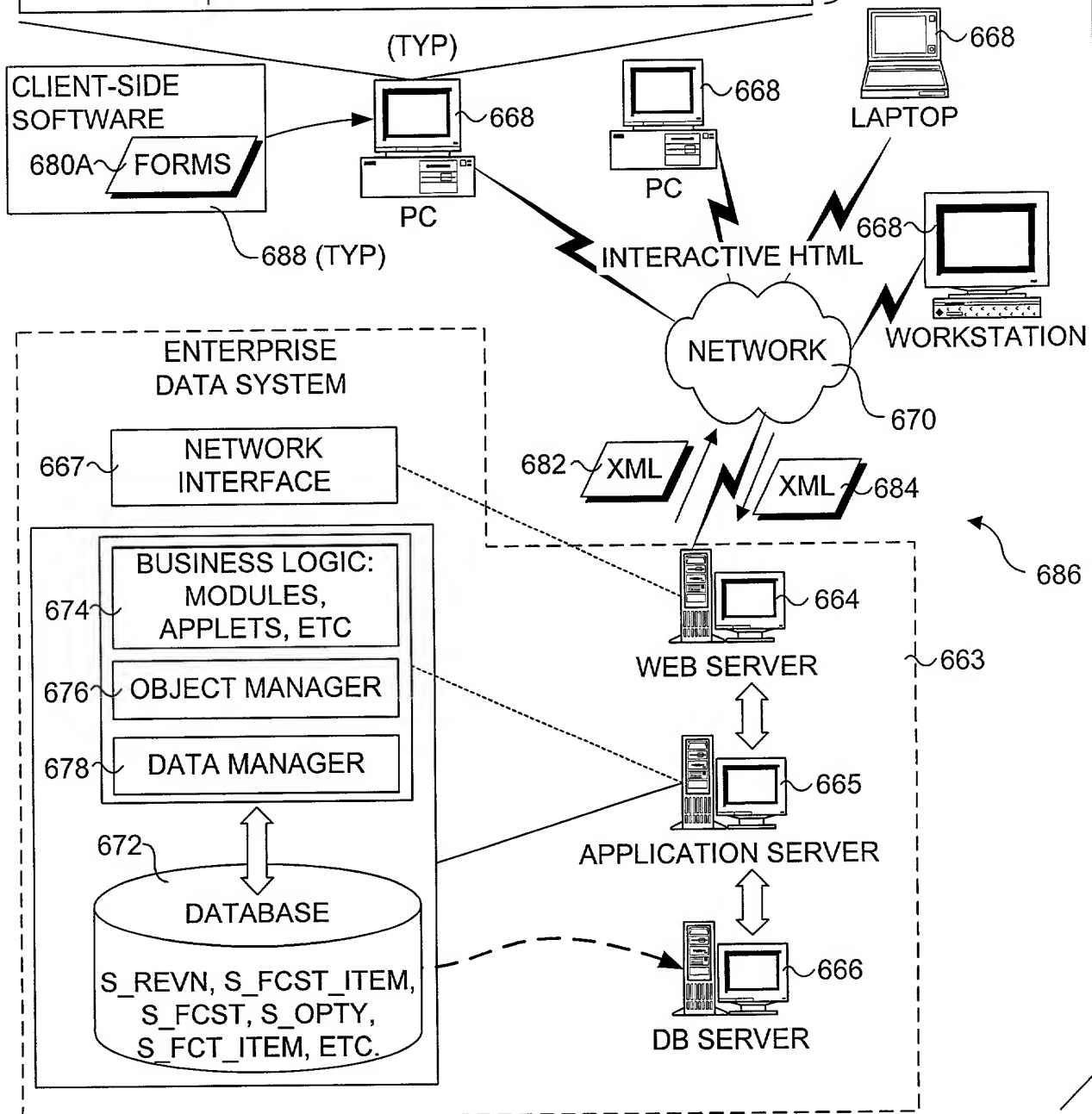
FIG. 32



Account	A.K. Parker Inc., HQ	Opportunity	275 Portables at A.K. Park	Committed	<input type="checkbox"/>
Address	101 Main Street San Mateo, CA 94402 USA	Description	Great opportunity for our...	Revenue	\$850,000
Source	ABC TV Ad	Lead Quality	High	Upside	\$125,000
		Methodology	Strategic Selling	Close Date	04/01/99
		Sales Stage	03 - Qualification	Probability	50%

Opportunity Revenues	Show: Revenue	By: Month	Then: Product/Description
<input type="checkbox"/> HP Laserjets <input checked="" type="checkbox"/> 1 GB Hard <input checked="" type="checkbox"/> Drive Services			
	Jan	Feb	Mar
	Months		

FIG. 33



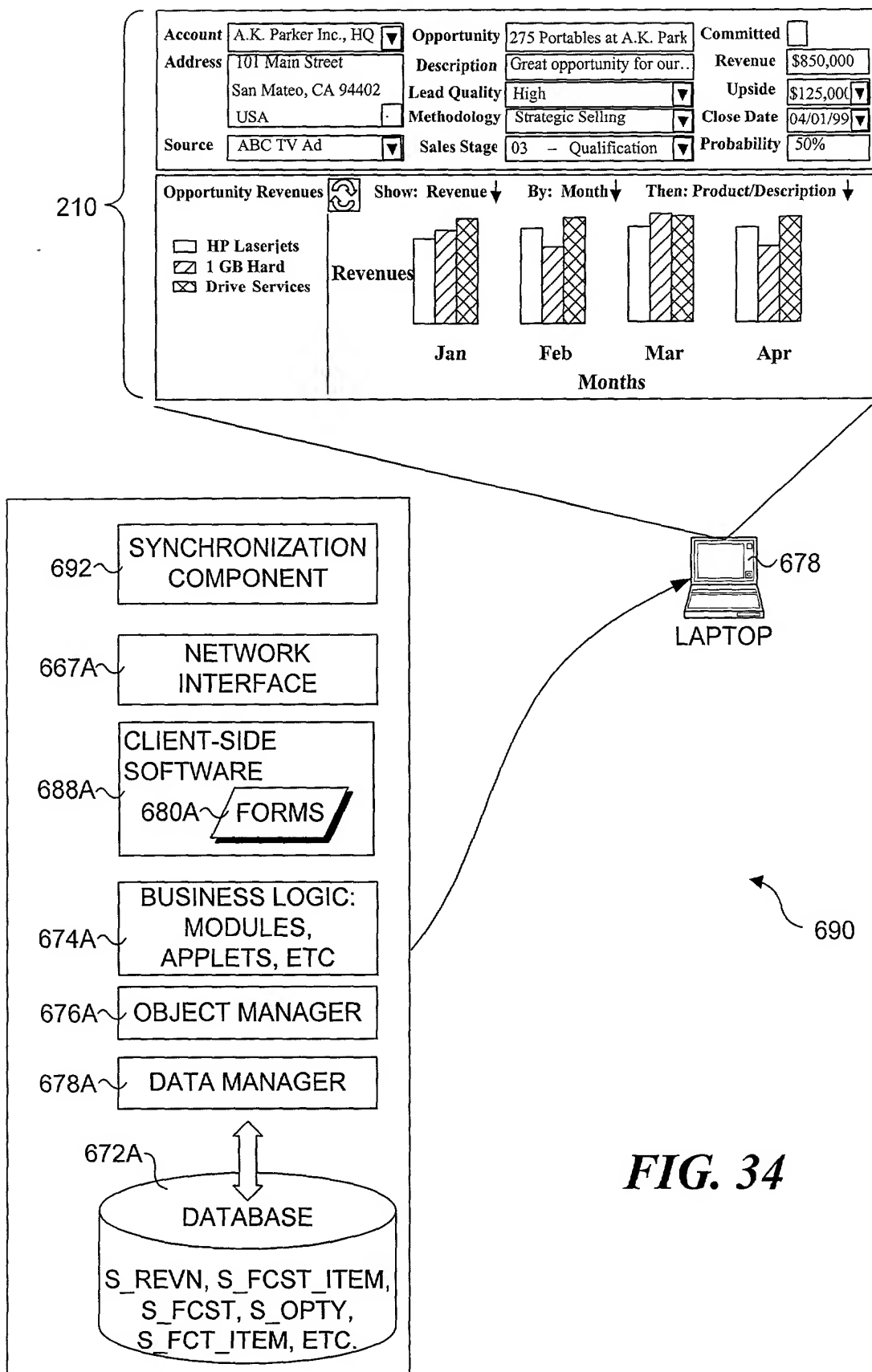


FIG. 34